Configuring and Using the SiteScape Gadgets for the Plumtree Corporate Portal™

This document describes how to configure and use the SiteScape gadgets with the Plumtree Corporate Portal.

This document presents information that is current as of the publishing date. SiteScape is committed to continuous improvement of its documentation. Please check our documentation web site for the latest revisions, documents, Help files, white papers, and more.

Product Version: SiteScape Forum, Version 7.0, and WebWorkZone's 12/1/02 update
Portal Version: Plumtree Corporate Portal Version 4.0
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Document Conventions

This document employs the following conventions:

What you see	What it means
general-summary gadget	New terms and variable text (identifiers that need to be replaced with text specific to your needs) appear in *italic* font.
Set Preferences **Administer** **OK**	References to links, toolbar items, and buttons appear in **bold** font.

`/_plumtree/summary`
`/_plumtree/ptSummaryPrefs`
`PTU_SSF_`
	URLs, path and file names, and information you must enter on HTML forms or command lines appear in `Courier` font.

[What are the SiteScape Gadgets?](#)	Cross-references are [underlined](#) (and blue, if you are viewing this document in color).

Chapter 1: Questions and Answers

What are SiteScape Forum and WebWorkZone?

SiteScape Forum is Internet software that facilitates online work by bridging the gap between working alone at your computer and working with your teammates. Forum provides a place for "virtual sharing," where teammates can chat, have discussions, share documents, and work together online.

Using Forum, everyone has access to a central location for important threaded discussions and documents. At any time, any person can go back, review previous discussions, and understand why certain decisions were made and why work was done a certain way. Forum also makes it easy to keep track of new or modified items, to be notified of changes, and to access previous versions of documents.

Using Forum, you can have discussions with teammates, co-author documents, transfer files across the web, maintain a calendar of appointments, search Forum pages for documents and discussions, and customize and organize your virtual workspace so that it complements your natural way of working and collaborating with teammates.

WebWorkZone (WWZ) is our hosted service, offering your organization the power of SiteScape Forum with the convenience of SiteScape technicians handling the installation and server administration for you. Subscribers are responsible for zone administration tasks such as adding user accounts and creating forums.

How Do I Access SiteScape Software?

You can use the Plumtree Corporate Portal™ to access our portlet software on an existing Forum installation or on WebWorkZone. For information about purchasing Forum, contact our friendly sales department at sales@sitescape.com.

For more information about installing and configuring a new version of Forum, see the SiteScape Forum Installation and Configuration Guide. For more information about SiteScape's hosted service, see our WebWorkZone home page.

If you would like to take Forum for a "test drive" before making a decision, you can point the Plumtree Corporate Portal™ to an area on WebWorkZone that you can use without charge for 30 days. In this way, you can test SiteScape's software features before making a purchase. To do this, read the information in the sections that follow, then follow the instructions in the Testing the Gadgets Using WebWorkZone section.

What are the SiteScape Gadgets?

SiteScape provides three types of streamlined, customizable interfaces, called *gadgets*, for use with the Plumtree Corporate Portal™:
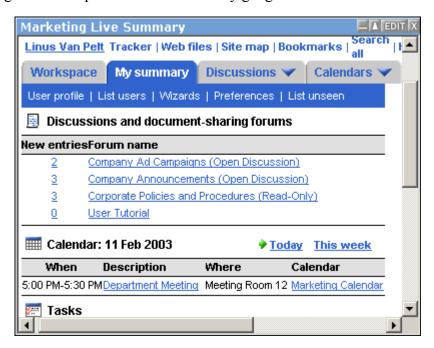
- The Live-Summary Gadget

- The General-Summary Gadget

- The Discussion-Summary Gadget

These SiteScape gadgets provide concise views into our collaboration software that fit neatly within the larger portal page.

The Live-Summary Gadget

The first type of gadget is called a live-summary gadget. This gadget runs SiteScape collaboration software "live," displaying the standard "My summary" page and providing access to all of the features of SiteScape software within the gadget's area on the portal page. The live-summary gadget has all of the capabilities of the other SiteScape gadgets. If your software supports it, we recommend that you use this gadget.

The following is an example of the live-summary gadget.

SiteScape software and browser requirements for running this gadget include the following:

- SiteScape Forum Version 6.0, build 114 or higher

- Internet Explorer Version or Netscape Version 6.0

  Note: *When you create a gadget, we recommend that you include information in the gadget description that tells users which browser supports that gadget.*

The General-Summary Gadget

The second type of gadget is called the general-summary gadget. This gadget works well with very small windows. The general-summary gadget displays a summary of activity in the discussion forums and calendars you have chosen to track, a list of chat sessions scheduled for the day, and a summary of messaging activity. Each of these elements is optional: for example, you can choose to display the discussion and calendar summaries but not chat or messaging.
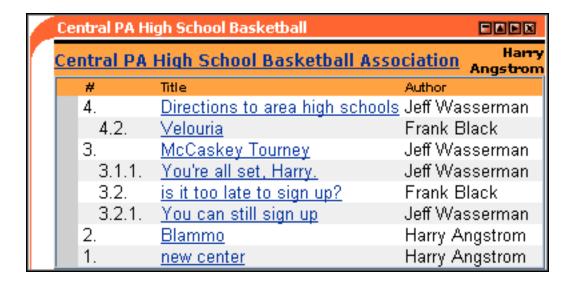
You can configure the links in this gadget's viewing area to open SiteScape pages in a new browser window. Otherwise, the new SiteScape page replaces the Oracle portal page in the browser window, and you can return to the Plumtree page by clicking on your browser's **Back** button.

The following is an example of SiteScape's general-summary gadget:

The Discussion-Summary Gadget

The third gadget is called a discussion-summary gadget and provides a streamlined view of one of our online discussion areas. The following is an example of SiteScape's discussion-summary gadget:

Central PA High School Basketball		▣▲▶▣
Central PA High School Basketball Association		**Harry Angstrom**
#	**Title**	**Author**
4.	Directions to area high schools	Jeff Wasserman
4.2.	Velouria	Frank Black
3.	McCaskey Tourney	Jeff Wasserman
3.1.1.	You're all set, Harry.	Jeff Wasserman
3.2.	is it too late to sign up?	Frank Black
3.2.1.	You can still sign up	Jeff Wasserman
2.	Blammo	Harry Angstrom
1.	new center	Harry Angstrom

What are the SiteScape Gadgets?

Chapter 2: Administration Guide

This section provides information about registering a SiteScape gadget for the Plumtree Corporate Portal. After you complete this process, read the User Guide chapter to help you provide Forum login information and learn to use the gadgets.

When you use the Plumtree software to register a gadget, Plumtree creates a placeholder that you configure later to contain a SiteScape gadget. To start with, we recommend that you register one gadget for a general summary and one for a discussion summary.

To register a gadget, you need to use the Gadget Wizard to complete the following forms:

- The GENERAL INFO Form

- The HTTP CONFIGURATION Form

- The ALIGNMENT AND ADMINISTRATIVE PREFERENCES Form

- The USER PERSONALIZATION Form and Remaining Forms

The GENERAL INFO Form

The GENERAL INFO form is the first page of the Gadget Wizard. To complete it, do the following:

1. Log in to the Plumtree Corporate Portal.
2. Click on the **Administration** link, located at the top of the page.
3. Click on the **GADGETS** link.
4. Click on the **ADD REMOTE GADGET** link.

   The GENERAL INFO form appears.
5. Enter a Gadget Name.

   This name (such as "SiteScape Live Summary" or "SiteScape Discussion Summary") appears in your gadget's banner on the Portal page.
6. Enter a Gadget Description.

   The description should briefly explain the gadget's purpose and browser requirements (for example, "Live collaboration summary and tools—IE and Netscape V6 only" or "Discussion area summary—Netscape V4.7x and lower").
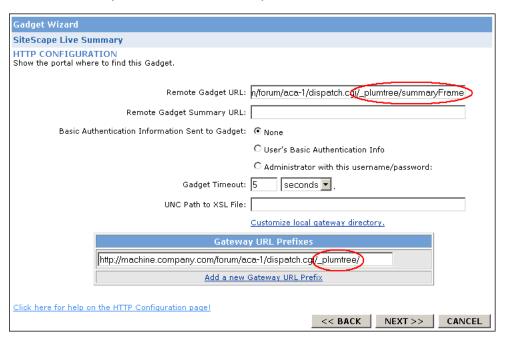7. If your installation supports the Gadget Server options, select your Gadget Server from the pull-down menu.
8. Make sure the "enabled" radio button is on.
9. Click on the **Next** button.

   The HTTP CONFIGURATION form appears.

The HTTP CONFIGURATION Form

To complete this form, do the following:

1. In the Remote Gadget URL text box, enter the URL that displays the SiteScape gadget. This is the same URL that you use to access the zone-workspace page, with added text at the end of the URL (as shown circled in red).

This additional text is case-sensitive, and varies depending on the type of gadget you want to register, as follows:

*   Live-Summary Gadget (shown in the previous picture)

    `http://`*`yourdomain`*`/`*`yourzone`*`/dispatch.cgi/_plumtree/summaryFrame`

*   General-Summary Gadget

    `http://`*`yourdomain`*`/`*`yourzone`*`/dispatch.cgi/_plumtree/summary`

*   Discussion-Summary Gadget

    `http://`*`yourdomain`*`/`*`yourzone`*`/dispatch.cgi/`*`discussionforumname`*`/ptSummary`

    Leave the radio button next to the word "None" selected.

2. Specify a Gadget Timeout time that is long enough for the Forum entry to load.

    If you are registering a live-summary gadget, specify 5 seconds. If you are specifying a general-summary gadget or a discussion-summary gadget, specify 15 seconds.

3. In the Gateway URL Prefixes text box, enter the following:

*   Live or General-Summary Gadgets

    `http://`*`yourdomain`*`/`*`yourzone`*`/dispatch.cgi/_plumtree/`

*   Discussion-Summary Gadgets

    `http://`*`yourdomain`*`/`*`yourzone`*`/dispatch.cgi/`*`discussionforumname`*`/`

4. Click on the **Next** button on this page and subsequent pages until you reach the ALIGNMENT AND ADMINISTRATIVE PREFERENCES form.
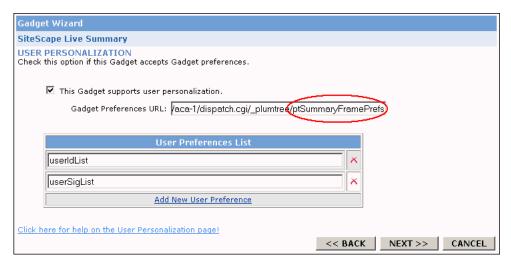
The ALIGNMENT AND ADMINISTRATIVE PREFERENCES Form

To complete the Alignment and Administrative Preferences form, do the following:

1. On the pull-down menu, select wide (for both the live-summary gadget and the discussion-summary gadget) or narrow (for the general-summary gadget).

2. Make sure that the "This Gadget supports administrative preferences" checkbox is unchecked.

3. Click on the **Next** button.

   The Plumtree portal displays the User Personalization form.

The USER PERSONALIZATION Form and Remaining Forms

To complete the User Personalization form and the remaining forms, do the following:

1. Click on the "This gadget supports user personalization" checkbox.

   Plumtree reloads the page. This can take a few seconds.

2. In the "Gadget Preferences URL" text box, enter the URL that points to SiteScape's code that allows users to change their preferences for the gadget. This is the same URL that you use to access the zone-workspace page, with added text at the end of the URL (as shown circled in red).

This additional text varies depending on the type of gadget you want to register, as follows:

- Live-Summary Gadget

  ```
  http://yourdomain/yourzone/dispatch.cgi/_plumtree/ptSummaryFramePrefs
  ```

- General-Summary Gadget

```
http://yourdomain/yourzone/dispatch.cgi/_plumtree/ptSummaryPrefs
```

- Discussion-Summary Gadget

```
http://yourdomain/yourzone/dispatch.cgi/docsharename/ptDocPrefs
```

3. Enter the following text in the User Preferences List text box:

```
userIdList
```

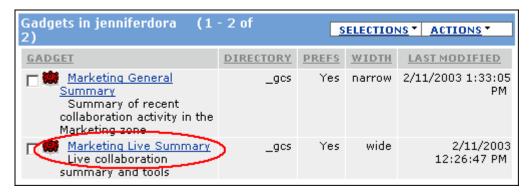4. Click on the **Add New User Preference** link below the text box.

   Plumtree refreshes the page and displays a new, second text box (this can take a few seconds).

5. Enter the following text in the new text box:

```
userSigList
```

6. Click on the **Next** button on this page and the remaining pages, until you reach the SECURITY form.

7. Click on the **Finish** button.

   Plumtree closes the wizard window and refreshes your administration page. Notice that your newly-created gadget is now listed in the Gadgets section, as follows:

For additional information about using the Gadget Wizard, refer to Plumtree's online Help system.

Chapter 3: User Guide

The information that follows tells you how to provide Forum login information and how to customize the look of the SiteScape gadget.

When you use the Plumtree portal, it is common to have members of the Administration group register and choose the gadgets, and have individual portal users be responsible for setting up the gadget with their personal log-in information and preferences.

Choosing a SiteScape Gadget for My Page

As the next step in the process, you need to select your newly registered gadget (or gadgets) for viewing on My Pages. To accomplish this, do the following:

1. In the Plumtree Gadget Workshop, view My Pages.
2. From the **My Pages** menu, choose **Edit This Page** and then **Choose Gadgets**.
3. Click on the folder that contains the SiteScape gadget.
4. Click on the checkbox next to the name of the gadget.
5. Click on the **ADD TO MY PAGE** button.

   The name of the SiteScape gadget appears in the "Gadgets on Your Page" column, to the right of the **ADD TO MY PAGE** button.
6. Click on the **FINISH** button.

   Plumtree returns to My Page, where your gadget now appears on the portal page.

The SiteScape gadget does not initially display information. To display information using the gadget, follow the instructions in the sections that follow. When you follow these instructions, you tell the gadget your Forum or WebWorkZone username and password, and you specify what you want the gadget to display.

Using the Live-Summary Gadget

After you specify your username and password the first time, SiteScape automatically logs you in the next time you access My Page.

The live-summary gadget provides you with the complete Forum or WebWorkZone product running within the gadget viewing area. Use of this gadget is identical to the standard use of our products. For information about using our product features, review our online Help by clicking on the **Help** link in the upper-right corner of the live-summary gadget window.

Using the General-Summary Gadget

The general-summary tool provides you with a customizable, concise summary of information about Forum or WebWorkZone activity, and links to our most commonly used features.

To set up and use SiteScape's general-summary gadget, do the following:

1. Log in to the Plumtree Portal.
2. View My Pages.
3. View the SiteScape general-summary gadget area.
4. Click on the **EDIT** button in the upper-right corner of the gadget area.

   Plumtree displays the SiteScape Forum User Preferences page. You use this form to determine what you would like to view with this gadget.

5. In the text boxes at the top of the form, enter your Forum or WebWorkZone username and password. Be sure to specify any uppercase letters in your username or password (both are case-sensitive).
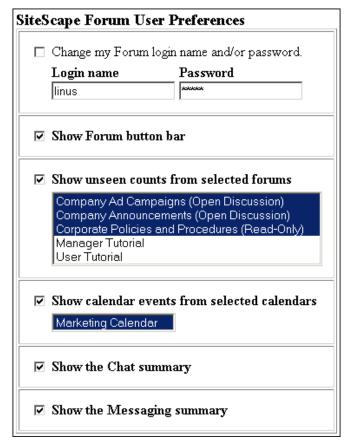
   Do not enter any other information on the form at this point.

6. Click **OK**.

   Plumtree redisplays My Page.

7. Click on the **EDIT** button again.

The SiteScape Forum User Preferences page reappears. It now displays the names of the forums and calendars to which you have access, as follows:

8. Click on the checkboxes of the features you want to use with this gadget. The optional features are as follows:

    - Show Forum button bar

       Provides buttons that allow you to view the zone-workspace page, access a list of all the new or modified discussion items that you have not yet seen, search for discussion items, or access your web file system.

    - Show unseen counts from selected forums

       Provides a count of new or modified ("unseen") items in specific discussion forums. You can use this item to track activity in the discussions that are of the most interest to you before actually viewing the discussion-forum pages.

    - Show calendar events from selected calendars

       Displays the appointments for the current day (by default). If you choose, you can display all of the appointments for the week.

    - Show the Chat summary
    - Show the Messaging summary

The gadget can display a list of the day's scheduled chat sessions and a list of all users and their messaging status. (These options are not displayed if your administrator disabled chat and messaging.)

9. When you are finished, click **OK**.

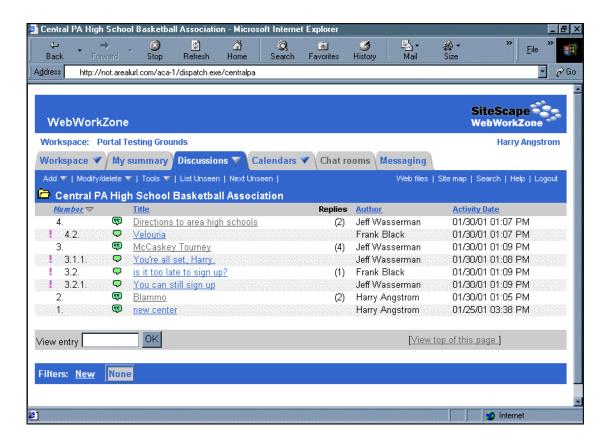My Page reappears. Your general-summary gadget now displays the information you specified:

To access Forum or WebWorkZone to collaborate with your teammates, you can click on a button or link within the gadget. For example, you can view a discussion forum by clicking on its title. Or, you can view a list of new or modified entries in that discussion forum by clicking on the number in the "New Entries" column.

Let's suppose that you see that the "Central PA High School Basketball Association" discussion has 4 new or modified entries, and you want to enter that discussion area. To do this, click on the title of that discussion, as follows:

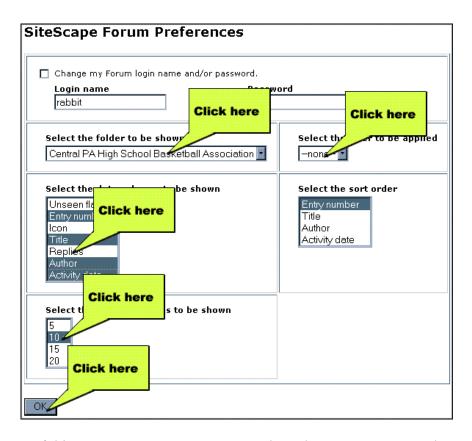The Forum gadget then displays the discussion in your browser window, as follows:

Using the Discussion-Summary Gadget

If you require more than a count of new or modified items in a discussion, you can use the discussion-summary gadget. This gadget provides a streamlined view of a discussion area, allowing you to view an entry's title, author, creation date, and more.

You set up the discussion-summary gadget in two steps. First, you specify your username, password, and the discussion forum you want to track. Second, you set your viewing preferences.

To set up the discussion-summary gadget, do the following:

1. Log in.
2. View My Page.
3. View the SiteScape discussion-summary gadget on the portal page.
4. Click on the **Customize Gadget** button in the upper-right corner of the gadget area:

   Plumtree displays the SiteScape Forum Preferences page.

5. At the top of this page, enter your Forum or WebWorkZone username and password.

6. Use the select boxes to set your preferences, as explained in the following list:

- Select the number of rows to be shown

  Determines how many discussion items appear in the gadget. This determines the length of the gadget on the portal page.

- Select the data columns to be shown

  Determines which columns of the folder listing appear in the gadget. This determines the width of the gadget on the portal page.

  For example, a default folder listing contains one column for the author of an entry and one for the date it was entered or last modified. If this information is not important to you, you can eliminate these columns from the gadget display.

- Select the sort order

  Tells Forum or WebWorkZone which data to use when sorting the discussion items.
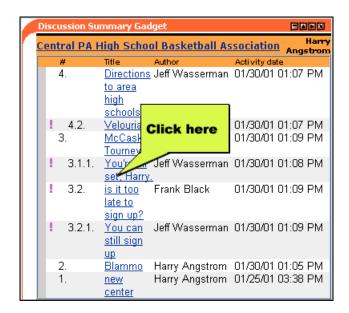
- Select the filter to be applied

  Selects and excludes certain discussion items based on data you provide to Forum.

  For example, using Forum, you can create a filter that causes the folder listing to include only those discussion items that contain the phrase "widget project plan" and were modified or created after June 1st, 2002. If you apply this filter to the gadget, the gadget "filters in" and displays only the discussion items that match your criteria.
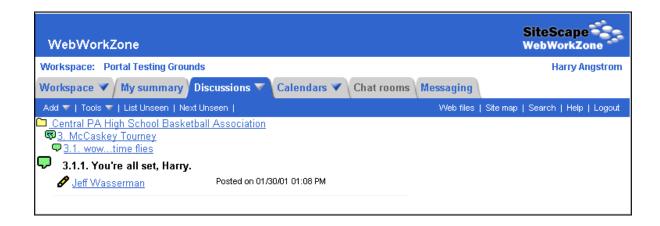
7. Click **OK**.

My Page reappears. The SiteScape gadget now displays the discussion items according to the preferences you specified.

Items preceded by a red exclamation point are new or modified items that you have not yet viewed. To view an item, click on its title, as follows:

Forum then displays the discussion item in your browser window, as follows:

Chapter 4: Testing the Gadgets with WebWorkZone

If you would like to view or test the SiteScape gadgets and have not purchased SiteScape Forum or WebWorkZone, you may sign up for a free 30-day trial of WebWorkZone. This trial is fully functional and allows you to create discussion forums, calendars, task forums, and chat rooms that you can then view using the SiteScape gadgets.

To sign up for a free 30-day trial of WebWorkZone, do the following:

1. Direct your browser to http://webworkzone.com.
2. Click on the **Sign up now for a free trial of WebWorkZone** button.

   Your browser displays a sign-up form
3. Fill in the fields, then click on the **Next** button at the bottom of the page.

   Your browser displays the confirmation screen for your new WebWorkZone zone.
4. Print or bookmark this screen for future reference.
5. Click **OK**.

   Your browser takes you to your brand-new WebWorkZone zone.

To create a SiteScape gadget that points to your new zone, do the following:

1. View the Plumtree Corporate Portal's My Page.
2. Follow the instructions in Registering a SiteScape Gadget, and specify that it is "in the wide column."
3. Follow the instructions in Choosing a SiteScape Gadget for My Page.
4. Provide initialization settings for the gadget.
5. Set up the discussion-summary gadget by following the instructions in Using the Discussion-Summary Gadget, and provide your login information.
6. If you choose, you can alter your user preferences (number of items displayed, number of columns displayed, and so forth) using the instructions in the same section.

For information about purchasing Forum or about the WebWorkZone hosting service, see SiteScape's company web pages.

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